

Separation Statuses Overview

The Separate Employee business process captures an employee's departure from an agency and, in some instances, the end of state service. Separation may be classified as voluntary (e.g., retirement, resignation) or involuntary (e.g., disciplinary action, Temporary Workforce Reduction (TWFR), layoff). This business process is applicable to both state agencies and localities in The Local Choice (TLC) program. The Layoff Process will not be covered in this Job Aid. For further information on the Layoff Process, see the Job Aid titled **HR351 Managing the Layoff Process**. This Job Aid can be found on the Cardinal website in **Job Aids** under **Learning**.

The employee, Agency, or legislation can initiate communication to the appropriate Agency HR staff regarding the need for a change. Every agency has its own approval process that must be completed before making the appropriate changes in the Cardinal system. Agencies utilize agency-specific systems or paper forms to route request through their approval process. No approval is included in the Cardinal system.

An Agency head, supervisor, or employee may submit documentation for a separation. The type of separation determines the required documentation that should be submitted to Agency HR. Agency HR will examine the nature of the separation and work with the appropriate personnel to complete the appropriate documentation.

The two types of **Separations** covered in this Job Aid are:

Involuntary

Termination: Termination is an employee's involuntary separation from state service, but does not include separation as a result of layoff. Examples include Standards of Conduct, Unsatisfactory Performance during Probationary Period, and Inability to Perform Duties.

Voluntary

- Resignation
- Retirement: Service Retirement, Retirement In Lieu of Layoff, or Enhanced Retirement
- Separation: Completion of Limited Appointment or Contract
- Death of Employee

Voluntary and Involuntary separations are keyed to inactivate the employee record. Action/Action Reasons are used to reflect the type of separation. In Cardinal, both Voluntary and Involuntary Separations use the Action of "Termination"; HR staff must reference the applicable Action Reason in order to identify correct cause of separation.

All HR modules are updated appropriately after the Termination transaction is saved:

- Benefit status is updated in Cardinal Benefits (BN); COBRA eligibility is triggered if applicable.
- Time Reporter is updated for Cardinal TA. Productive and Non-productive time can still be entered and approved prior to the effective date of the Separation. The updated HR status will stop leave accruals.
- The updated Payroll status will not create a paysheet for the employee.

Separation Statuses (continued)

Prior to beginning this process, review the Job Aid titled **HR351 Using the Termination Checklist**. This Job Aid can be found on the Cardinal website in **Job Aids** under **Learning**.

Agency HR must coordinate with Agency Payroll and Agency Benefits Administrator (BA) for final pay, (e.g., salary, OT, leave payout) due the employee. Additional steps may be needed to create Paysheet in order to make the final payments. If there is a large volume of updates, the agency can submit a file to be uploaded using the mass upload process. For further information on Mass Updates, see the Job Aid titled **HR351 Managing the Mass Upload Process**. This Job Aid can be found on the Cardinal website in **Job Aids** under **Learning**.

In Cardinal, the **Effective date** of a termination is the calendar date directly after the last day worked. For example, if the employee last worked on Friday, the **Termination Effective Date** will be Saturday, as it is the calendar date directly after the last day worked.

There are two Action Reason combinations related to an employee's death. One is Termination/Death, and the other is Termination/Death with Dependent. The difference between the two events is that the benefits terminate on different dates. When an employee passes away, the Benefit Administrator should review the employee's current health plan coverage code and advise the HR Administrator whether to use the Termination/Death or Termination/Death with Dependent Action/Reason combination.

Future dated rows may be entered online if the effective dates are known for the status updates.

Link the employee to the Termination checklist to guide the user through the COVA Termination tasks to complete. For further information on Cardinal Checklists see the Job Aid titled **HR351 Using a Checklist**. This Job Aid can be found on the Cardinal website in **Job Aids** under **Learning**.

The employee email address must be updated in Cardinal after separation in order for the employee, their surviving family, or retirees, to gain access to Cardinal to view pay history and W2s. The HR Administrator obtains the personal email address and updates the email address in Cardinal from Agency Provided to Employee Provided. Agency HR must also check the personal email address as Preferred. Selecting this email address as preferred is the driving factor for post-employment system access. Separated employees will then have access to Cardinal for 18 months after the Termination Date. After 18 months, this access ends automatically. Agency HR does not need to go back in and remove the personal email address.

Note: Once Cardinal HCM goes live, any employees terminated within Cardinal HCM from that point forward, will automatically have limited Employee Self-Service (ESS) access for 1.5 years after termination (e.g., viewing W-2). Retired employees will also have access to Cardinal. In order for a Terminated or a Retired employee to log into Cardinal, a valid personal email address is required on the Personal Data record in Cardinal.

Note: For Separations related to Involuntary terminations, refer to **DHRM Policy 1.45** and **1.60**.

Note: For Separations related to terminating an employee once Severance benefits end, refer to **DHRM 1.57**.

Note: For Separations related to Long Term Disability, refer to **DHRM Policy 4.57**.



When terminating an employee, the Agency BA will need to process the termination of benefit elections for the Terminated employee. See **Job BN361 Quick Reference Guide** section **Processing Benefit Elections: Transfer Out / Termination Employees** for more details. This job aid is located on the Cardinal website in **Job Aids** under **Learning**.

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Termination – Voluntary

1. Navigate to the **Job Data** page using the following path:

Navigator > Workforce Administration > Job Information > Job Data

The **Job Data Search** page displays.

Job Data

Enter any information you have and click Search. Leave fields blank for a list of all values.

[Find an Existing Value](#)

▼ **Search Criteria**

Empl ID

begins with ▼

Empl Record

= ▼

Name

begins with ▼

Last Name

begins with ▼

Second Last Name

begins with ▼

Alternate Character Name

begins with ▼

Middle Name

begins with ▼

☐ Include History ☐ Correct History ☐ Case Sensitive

Limit the number of results to (up to 300):

Search

Clear

[Basic Search](#)

[Save Search Criteria](#)

2. Search for the applicable employee by entering the Employee ID in the **Empl ID** field.

Note: You can also search by Employee Record or Name using the corresponding fields. However, it is recommended to use the Employee ID as it is a unique identifier for each employee.

3. Click the **Search** button.



Human Resources Job Aid

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The **Job Data** page for the applicable employee displays with the **Work Location** tab displayed by default.

Cardinal Homepage Job Data

Work Location Job Information Payroll Salary Plan Compensation

Employee Empl ID [REDACTED] Empl Record 0

Work Location Details ? 1 of 1

*Effective Date 08/24/2020 Go To Row + -

Effective Sequence 0 *Action Pay Rate Change

HR Status Active Reason Additional Duties

Payroll Status Active *Job Indicator Primary Job

Position Number VDHKBST Drug Specialist

Override Position Data

Position Entry Date 11/25/2019 Position Management Record

Regulatory Region USA United States

Company VDH Department of Health

Business Unit 60100 Department of Health

Department 100900 FAIRFAX DISTRICT

Department Entry Date 11/25/2019

- Click the **Add a New Row** icon (+) to add a new effective dated row.

The **Work Location** tab refreshes with a new effective dated row displayed.

Cardinal Homepage Job Data

Work Location Job Information Payroll Salary Plan Compensation

Employee Empl ID [REDACTED] Empl Record 0

Work Location Details ? 1 of 2

*Effective Date 11/11/2020 Go To Row + -

Effective Sequence 0 *Action Pay Rate Change

HR Status Active Reason Additional Duties

Payroll Status Active *Job Indicator Primary Job

Position Number VDHKBST Drug Specialist

Override Position Data

Position Entry Date 11/25/2019 Position Management Record

Regulatory Region USA United States

Company VDH Department of Health

Business Unit 60100 Department of Health

Department 100900 FAIRFAX DISTRICT

Department Entry Date 11/25/2019

Note: When adding a new effective dated row, Cardinal copies the data from the previous row to reduce the amount of data entry required.

- The **Effective Date** field defaults to the current system date. Update this date as needed using the **Calendar** icon.

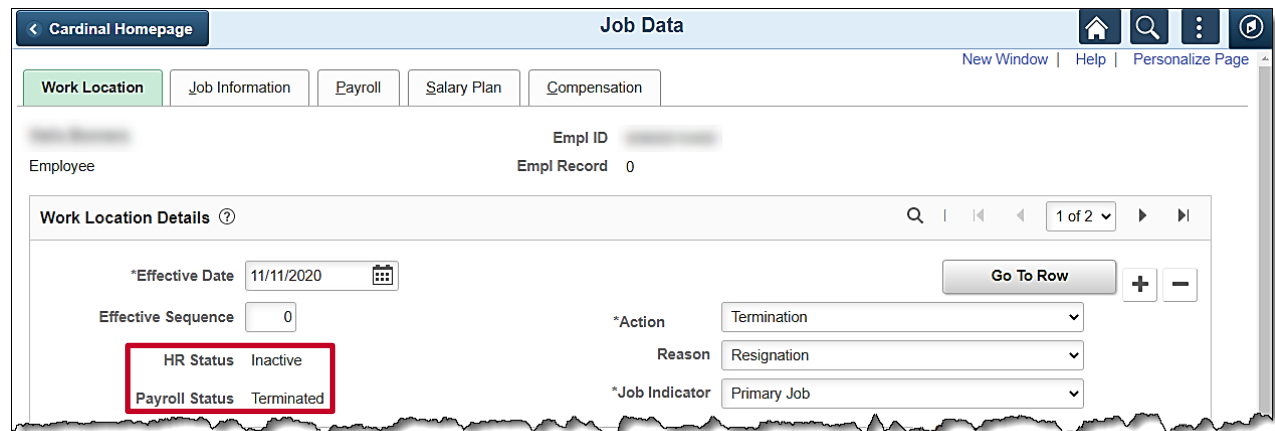
Note: Set the effective date to be one day after the employee's last day worked. If an employee's last day is 11/10/2021, the effective date of the termination should be 11/11/2021. For further information on effective dating, see the Job Aid titled **HR351 Overview of Effective Dating**. This Job Aid can be found on the Cardinal website in **Job Aids** under **Learning**.

- Select the "**Termination**" option using the **Action** field dropdown button.
- Select the applicable reason using the **Reason** field dropdown button.

Note: There are two Action Reason combinations related to an employee's death. One is Termination/Death, and the other is Termination/Death with Dependent. The difference between the two events is that the benefits terminate on different dates. When an employee passes away, the Benefit Administrator should review the employee's current health plan coverage code and advise the HR Administrator whether to use the Termination/Death or Termination/Death with Dependent Action/Reason combination.

For further information on Action Reasons, see the Job Aid titled **HR351 Action/Action Reasons**. This Job Aid can be found on the Cardinal website in **Job Aids** under **Learning**.

The **Job Data** page refreshes.



Cardinal Homepage Job Data

Work Location Job Information Payroll Salary Plan Compensation

Employee Empl ID Empl Record 0

Work Location Details ②

*Effective Date 11/11/2020

Effective Sequence 0

HR Status Inactive

Payroll Status Terminated

*Action Termination

Reason Resignation

*Job Indicator Primary Job

- After selecting the Action and Action Reason, the **HR Status** and **Payroll Status** fields automatically update. Validate that the HR status displays as "Inactive" and the Payroll status displays as "Terminated".



The **Job Data** page returns.

The screenshot shows the 'Job Data' page for an employee. The page has a navigation bar at the top with 'Cardinal Homepage' and 'Job Data'. Below the navigation bar are tabs for 'Work Location', 'Job Information', 'Payroll', 'Salary Plan', and 'Compensation'. The 'Work Location' tab is selected. The page displays employee information, including 'Empl ID' and 'Empl Record'. The 'Work Location Details' section shows fields for 'Effective Date', 'Effective Sequence', 'HR Status', 'Payroll Status', 'Position Number', 'Position Entry Date', 'Regulatory Region', 'Company', 'Business Unit', 'Department', 'Department Entry Date', 'Location', 'Establishment ID', 'Termination Date', 'STD Claim Number', 'Layoff Notice Date', and 'Recall Eligibility Flag'. The 'Save' button is highlighted with a red box. Other buttons include 'Return to Search', 'Notify', 'Refresh', 'Update/Display', 'Include History', and 'Correct History'.

9. Click the **Save** button.

If a Termination Action Reason of “Death” or “Death with Dependent” is selected, the death date on the employee’s Personal Record is updated, and the **Death Warning Message** displays in a pop-up window.

The screenshot shows a pop-up window with the following text: "Warning -- Date of Death on personal data gets updated for the current transaction. (1000,1471)" and "Date of Death on personal data gets updated for the current transaction." Below the text are two buttons: "OK" and "Cancel".

10. Click the **OK** button.



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The **Job Data** page returns.

The screenshot displays the 'Job Data' page for an employee. The page is divided into several sections:

- Header:** Includes 'Cardinal Homepage', 'Job Data', and navigation links like 'New Window', 'Help', and 'Personalize Page'.
- Tabs:** 'Work Location' (selected), 'Job Information', 'Payroll', 'Salary Plan', and 'Compensation'.
- Employee Info:** Shows 'Empl ID' and 'Empl Record 0'.
- Work Location Details:** A table with columns for 'Effective Date', 'Effective Sequence', 'HR Status', 'Payroll Status', 'Action', 'Reason', and 'Job Indicator'. The table shows one record with 'Effective Date' 11/11/2020, 'Effective Sequence' 0, 'HR Status' Inactive, 'Payroll Status' Terminated, 'Action' Termination, 'Reason' Resignation, and 'Job Indicator' Primary Job.
- Position Information:** Includes 'Position Number' (VDHKBST), 'Position Entry Date' (11/25/2019), 'Regulatory Region' (USA), 'Company' (VDH), 'Business Unit' (60100), 'Department' (100900), 'Department Entry Date' (11/25/2019), 'Location' (60100), and 'Establishment ID'.
- Termination Information:** Includes 'Last Start Date' (11/25/2019), 'Termination Date' (11/10/2020), 'Expected Job End Date', 'Last Date Worked' (11/10/2020), 'STD Claim Number', 'Layoff Notice Date', and 'Recall Eligibility Flag'.
- Footer:** Includes 'Save', 'Return to Search', 'Notify', 'Refresh', 'Update/Display', 'Include History', and 'Correct History' buttons.

11. The employee's email address should be updated to a personal email in Personal Data. Navigate to the **Modify a Person** page using the following navigation:

Navigator > Workforce Administration > Personal Information > Modify a Person



The **Modify a Person** search page displays.

Personal Information

Enter any information you have and click Search. Leave fields blank for a list of all values.

[Find an Existing Value](#)

▼ **Search Criteria**

Empl ID begins with

Name begins with

Last Name begins with

Second Last Name begins with

Alternate Character Name begins with

Middle Name begins with

☐ Include History ☐ Case Sensitive

Limit the number of results to (up to 300):

[Search](#) [Clear](#) [Basic Search](#) [Save Search Criteria](#)

12. Enter the employee ID in the **Employee ID** field and click the **Search** button.

The **Biographical Details** tab on the **Modify a Person** page displays.

Biographical Details **Contact Information** Regional VA Person Info

Person ID

Name 1 of 2 [View All](#)

Effective Date 12/31/2019

Format Type English

Display Name

Biographic Information

Date of Birth 08/04/1991 Years 30 Months 3

Date of Death

Birth Country USA United States

Birth State

Birth Location ☐ Exclude Contact Information?

13. Click the **Contact Information** tab.

The **Contact Information** tab on the **Modify a Person** page displays.



Human Resources Job Aid

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Email Option Selection

☐ Agency Provided Email ☒ Pending Agency Provided Email ☐ Employee Provided Email

Email Addresses

| *Email Type | *Email Address | Preferred | | |
|-------------|-----------------------|-------------------------------------|---|---|
| Business | john.doe@virginia.gov | <input checked="" type="checkbox"/> | + | - |

Instant Message IDs ?

1-1 of 1 | View All

| *IM Protocol | *IM Domain | *Network ID | Preferred | | |
|--------------|------------|-------------|--------------------------|---|---|
| | | | <input type="checkbox"/> | + | - |

Save **Return to Search** **Previous in List** **Next in List** **Notify** **Refresh** **Update/Display** **Include Histo**

[Biographical Details](#) | [Contact Information](#) | [Regional](#) | [VA Person Info](#)

14. Scroll down to the **Email Addresses** section. Uncheck the **Preferred** checkbox from the business email address.
15. Click the **Add a New Row** button to add a new email address.
16. Select **Personal** from the **Email Type** field, enter the personal email address in the **Email Address** field and check the **Preferred** checkbox.

Email Option Selection

☐ Agency Provided Email ☐ Pending Agency Provided Email ☒ Employee Provided Email

Email Addresses

| *Email Type | *Email Address | Preferred | | |
|-------------|-----------------------|-------------------------------------|---|---|
| Business | john.doe@virginia.gov | <input type="checkbox"/> | + | - |
| Personal | john.doe@hotmail.com | <input checked="" type="checkbox"/> | + | - |

Instant Message IDs ?

1-1 of 1 | View All

| *IM Protocol | *IM Domain | *Network ID | Preferred | | |
|--------------|------------|-------------|--------------------------|---|---|
| | | | <input type="checkbox"/> | + | - |

Save **Return to Search** **Previous in List** **Next in List** **Notify** **Refresh** **Update/Display** **Include Histo**

17. Click the **Save** button.
18. To run the Employee Activity Report for the employee, use the following navigation:

Navigator > Workforce Administration > Job Information > Reports > Employee Activity Report

19. Run the Employee Activity Report for the employee.

Note: For additional information on the Employee Activity Report and the steps used to run this report, refer to the **HCM Reports Catalog**. The HCM Reports Catalog can be found on the Cardinal website under **Resources**. Print the report and place the printed transaction in the employee file for future audit requests.



Termination – Involuntary (except Layoff)

1. Navigate to the **Job Data Search** page using the following path:

Navigator > Workforce Administration > Job Information > Job Data

The **Job Data Search** page displays.

Job Data

Enter any information you have and click Search. Leave fields blank for a list of all values.

[Find an Existing Value](#)

▼ **Search Criteria**

Empl ID

begins with ▼

Empl Record

= ▼

Name

begins with ▼

Last Name

begins with ▼

Second Last Name

begins with ▼

Alternate Character Name

begins with ▼

Middle Name

begins with ▼

☐ Include History ☐ Correct History ☐ Case Sensitive

Limit the number of results to (up to 300):

Search

Clear

[Basic Search](#)

[Save Search Criteria](#)

2. Search for the applicable employee by entering the Employee ID in the **Empl ID** field.

Note: You can also search by Employee Record or Name using the corresponding fields. However, it is recommended to use the Employee ID as it is a unique identifier for each employee.

3. Click the **Search** button.



Human Resources Job Aid

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The **Job Data** page for the applicable employee displays with the **Work Location** tab displayed by default.

Cardinal Homepage Job Data

Work Location Job Information Payroll Salary Plan Compensation

Employee Empl ID Empl Record 0

Work Location Details

*Effective Date 12/10/2019

Effective Sequence 0

HR Status Active

Payroll Status Active

Position Number DSP00530 Executive Secretary

Position Entry Date 12/10/2019

Go To Row + -

*Action Hire

Reason New Hire

*Job Indicator Primary Job

Current

Override Position Data

- Click the **Add a New Row** icon (+) to add a new effective dated row.

The **Work Location** tab refreshes with a new effective dated row displayed.

Cardinal Homepage Job Data

Work Location Job Information Payroll Salary Plan Compensation

Employee Empl ID Empl Record 0

Work Location Details

*Effective Date 11/11/2020

Effective Sequence 0

HR Status Active

Payroll Status Active

Position Number DSP00530 Executive Secretary

Position Entry Date 11/11/2020

Go To Row + -

*Action Hire

Reason New Hire

*Job Indicator Primary Job

Current

Override Position Data

Note: When adding a new effective dated row, Cardinal copies the data from the previous row to reduce the amount of data entry required.

- The **Effective Date** field defaults to the current system date. Update this date as needed using the **Calendar** icon.

Note: For further information on effective dating, see the Job Aid titled **HR351 Overview of Effective Dating**. This Job Aid can be found on the Cardinal website in **Job Aids** under **Learning**.

- Select the **“Termination”** option using the **Action** field dropdown button.
- Select the applicable reason using the **Reason** field dropdown button.

Note: For further information on Action Reasons, see the Job Aid titled **HR351 Action/Action Reasons**. This Job Aid can be found on the Cardinal website in **Job Aids** under **Learning**.

The **Job Data** page refreshes.



Cardinal Homepage Job Data

Work Location Job Information Payroll Salary Plan Compensation

Employee Empl ID Empl Record 0

Work Location Details 1 of 2

*Effective Date 11/11/2020

Effective Sequence 0

HR Status Inactive

Payroll Status Terminated

*Action Termination

Reason Invol-Unsatisf Perf on Prob

*Job Indicator Primary Job

Go To Row + -

Position Number DSP00530 Executive Secretary

Override Position Data

Position Entry Date 12/10/2019

Regulatory Region USA United States

Company DSP Department of State Police

Business Unit 15600 Department of State Police

Department 040000 BASS > CJIS

Department Entry Date 12/10/2019

Location CENTR Department of State Police

Establishment ID VSP Department of State Police

Date Created 11/11/2020

Last Start Date 12/10/2019

Termination Date 11/10/2020

Expected Job End Date

STD Claim Number

Layoff Notice Date

Last Date Worked 11/10/2020

Override Last Date Worked

Recall Eligibility Flag

Job Data Employment Data Earnings Distribution Benefits Program Participation

Save Return to Search Notify Refresh

Update/Display Include History Correct History

Work Location Job Information Payroll Salary Plan Compensation

- After selecting the Action and Action Reason, the **HR Status** and **Payroll Status** fields automatically update. Validate that the HR status displays as "Inactive" and the Payroll status displays as "Terminated".
- Click the **Save** button.



Human Resources Job Aid

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The **Job Data** page returns.

The screenshot displays the 'Job Data' page for an employee. The page is divided into several sections:

- Header:** Includes 'Cardinal Homepage', 'Job Data', and navigation links like 'New Window', 'Help', and 'Personalize Page'.
- Tabs:** 'Work Location' (selected), 'Job Information', 'Payroll', 'Salary Plan', and 'Compensation'.
- Employee Info:** Shows 'Empl ID' and 'Empl Record 0'.
- Work Location Details:** A table with columns for 'Effective Date', 'Effective Sequence', 'HR Status', 'Payroll Status', 'Action', 'Reason', and 'Job Indicator'. The current row shows '11/11/2020', '0', 'Inactive', 'Terminated', 'Termination', 'Resignation', and 'Primary Job'.
- Position Information:** Includes 'Position Number' (VDHKBST), 'Position Entry Date' (11/25/2019), 'Regulatory Region' (USA), 'Company' (VDH), 'Business Unit' (60100), 'Department' (100900), 'Department Entry Date' (11/25/2019), 'Location' (60100), and 'Establishment ID'.
- Termination Information:** Includes 'Last Start Date' (11/25/2019), 'Termination Date' (11/10/2020), 'Expected Job End Date', 'Last Date Worked' (11/10/2020), 'STD Claim Number', 'Layoff Notice Date', and 'Recall Eligibility Flag'.
- Footer:** Includes 'Save', 'Return to Search', 'Notify', 'Refresh', 'Update/Display', 'Include History', and 'Correct History' buttons.

- The employee's email address should be updated to a personal email in Personal Data. Navigate to the **Modify a Person** page using the following navigation:

Navigator > Workforce Administration > Personal Information > Modify a Person



The **Modify a Person** search page displays.

Personal Information

Enter any information you have and click Search. Leave fields blank for a list of all values.

[Find an Existing Value](#)

▼ **Search Criteria**

Empl ID begins with

Name begins with

Last Name begins with

Second Last Name begins with

Alternate Character Name begins with

Middle Name begins with

☐ Include History ☐ Case Sensitive

Limit the number of results to (up to 300):

[Search](#) [Clear](#) [Basic Search](#) [Save Search Criteria](#)

11. Enter the employee ID in the **Employee ID** field and click the **Search** button.

The **Biographical Details** tab on the **Modify a Person** page displays.

Cardinal Homepage **Job Data** [New Window](#) [Help](#) [Personalize Page](#)

[Work Location](#) [Job Information](#) [Payroll](#) [Salary Plan](#) [Compensation](#)

Employee Empl ID Empl Record 0

Work Location Details [Q](#) | [1 of 1](#)

*Effective Date 12/10/2019 [Go To Row](#) [+](#) [-](#)

Effective Sequence 0 *Action Hire [v](#)

HR Status Active Reason New Hire [v](#)

Payroll Status Active *Job Indicator Primary Job [v](#)

Position Number DSP00630 [Q](#) Executive Secretary [Current](#) [v](#)

[Override Position Data](#)

Position Entry Date 12/10/2019 ☐ Position Management Record

12. Click the **Contact Information** tab.



The **Contact Information** tab on the **Modify a Person** page displays.

Email Option Selection

☐ Agency Provided Email ☒ Pending Agency Provided Email ☐ Employee Provided Email

Email Addresses

| *Email Type | *Email Address | Preferred | | |
|-------------|-----------------------|-------------------------------------|---|---|
| Business | john.doe@virginia.gov | <input checked="" type="checkbox"/> | + | - |

Instant Message IDs ?

1-1 of 1 | View All

| *IM Protocol | *IM Domain | *Network ID | Preferred | | |
|--------------|------------|-------------|--------------------------|---|---|
| | | | <input type="checkbox"/> | + | - |

Save **Return to Search** **Previous in List** **Next in List** **Notify** **Refresh** **Update/Display** **Include History**

[Biographical Details](#) | [Contact Information](#) | [Regional](#) | [VA Person Info](#)

13. Scroll down to the **Email Addresses** section. Uncheck the **Preferred** checkbox from the business email address.
14. Click the **Add a New Row** button to add a new email address.
15. Select **Personal** from the **Email Type** field, enter the personal email address in the **Email Address** field and check the **Preferred** checkbox.

Email Option Selection

☐ Agency Provided Email ☐ Pending Agency Provided Email ☒ Employee Provided Email

Email Addresses

| *Email Type | *Email Address | Preferred | | |
|-------------|-----------------------|-------------------------------------|---|---|
| Business | john.doe@virginia.gov | <input type="checkbox"/> | + | - |
| Personal | john.doe@hotmail.com | <input checked="" type="checkbox"/> | + | - |

Instant Message IDs ?

1-1 of 1 | View All

| *IM Protocol | *IM Domain | *Network ID | Preferred | | |
|--------------|------------|-------------|--------------------------|---|---|
| | | | <input type="checkbox"/> | + | - |

Save **Return to Search** **Previous in List** **Next in List** **Notify** **Refresh** **Update/Display** **Include History**

[Biographical Details](#) | [Contact Information](#) | [Regional](#) | [VA Person Info](#)

16. Click the **Save** button.

17. To run the Employee Activity Report for the employee, use the following navigation:

Navigator > Workforce Administration > Job Information > Reports > Employee Activity Report

18. Run the Employee Activity Report for the employee.

Note: Refer to the **HCM Reports Catalog** for additional information and the steps used to run this report. The **HCM Reports Catalog** can be found on the Cardinal website under **Resources**.

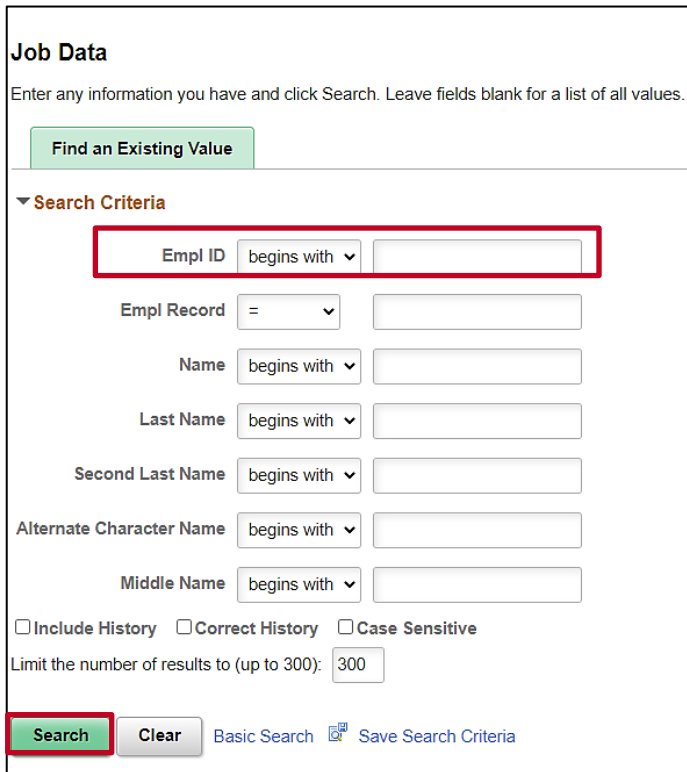
19. Print the report and place the printed transaction in the employee file for future audit requests.

Retirement – VRS Retiree

1. Navigate to the **Job Data** page using the following path:

Navigator > Workforce Administration > Job Information > Job Data

The **Job Data Search** page displays.

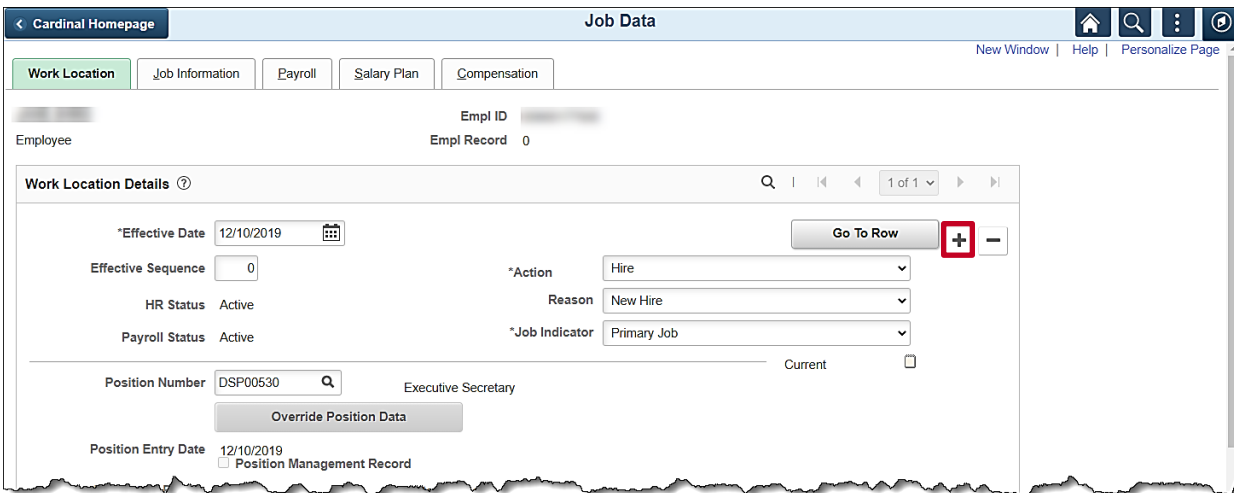


2. Search for the applicable employee by entering the Employee ID in the **Empl ID** field.

Note: You can also search by Employee Record or Name using the corresponding fields. However, it is recommended to use the Employee ID as it is a unique identifier for each employee.

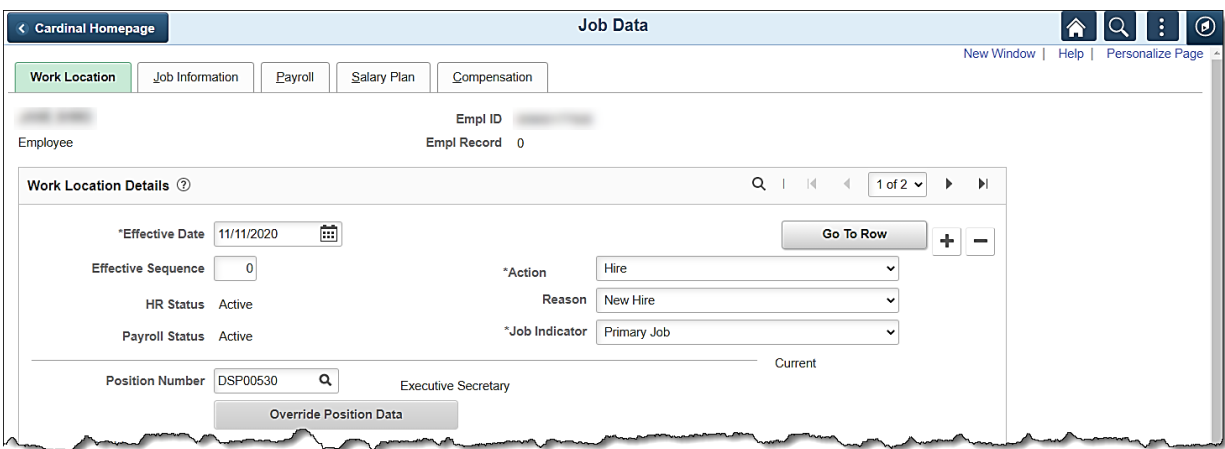
3. Click the **Search** button.

The **Job Data** page for the applicable employee displays with the **Work Location** tab displayed by default.



4. Click the **Add a New Row** icon (+) to add a new effective dated row.

The **Work Location** tab refreshes with a new effective dated row displayed.



Note: When adding a new effective dated row, Cardinal copies the data from the previous row to reduce the amount of data entry required.

5. The **Effective Date** field defaults to the current system date. Update this date as needed using the **Calendar** icon.

Note: Set the effective date to be one day after the employee's last day worked. If an employee's last day is 11/10/2021, the effective date of the termination should be 11/11/2021. For further information on effective dating, see the Job Aid titled **HR351 Overview of Effective Dating**. This Job Aid can be found on the Cardinal website in **Job Aids** under **Learning**.

6. Select the "**Retirement**" option using the **Action** field dropdown button.
7. Select the applicable reason using the **Reason** field dropdown button.

Note: For further information on Action Reasons, see the Job Aid titled **HR351 Action/Action Reasons**. This Job Aid can be found on the Cardinal website in **Job Aids** under **Learning**.



The **Job Data** page refreshes.

The screenshot displays the 'Job Data' page in the Cardinal HR system. The page is divided into several sections. At the top, there are tabs for 'Work Location', 'Job Information', 'Payroll', 'Salary Plan', and 'Compensation'. The 'Work Location' tab is selected. Below the tabs, there is a header section with 'Employee ID' and 'Empl Record 0'. The main section is titled 'Work Location Details' and contains various fields and buttons. The 'Effective Date' is set to 11/11/2020. The 'Effective Sequence' is 0. The 'HR Status' is 'Inactive' and the 'Payroll Status' is 'Retired', both of which are highlighted with a red box. The 'Action' is 'Retirement' and the 'Reason' is 'Service Retirement'. The 'Job Indicator' is 'Primary Job'. There is a 'Calculate Status and Dates' button. Below this, there is a section for 'Position Number' (DOA00049) and 'EDI Coordinator'. The 'Position Entry Date' is 12/10/2019. The 'Regulatory Region' is 'USA' and the 'Company' is 'DOA'. The 'Business Unit' is '15100' and the 'Department' is '95400'. The 'Department Entry Date' is 12/10/2019. The 'Location' is 'CENTR' and the 'Establishment ID' is 'DOA'. The 'Date Created' is 11/12/2020. At the bottom, there are buttons for 'Save', 'Return to Search', 'Notify', 'Refresh', 'Update/Display', 'Include History', and 'Correct History'. The 'Save' button is highlighted with a red box.

8. After selecting the action and action reason, the **HR Status** and **Payroll Status** fields will automatically update as applicable. Validate that the HR status displays as “Inactive” and the Payroll status displays as “Retired”.
9. Click the **Save** button.
10. The employee’s email address should be updated to a personal email in Personal Data. Navigate to the **Modify a Person** page using the following navigation:

Navigator > Workforce Administration > Personal Information > Modify a Person

The **Modify a Person** search page displays.



Personal Information

Enter any information you have and click Search. Leave fields blank for a list of all values.

[Find an Existing Value](#)

Search Criteria

Empl ID begins with

Name begins with

Last Name begins with

Second Last Name begins with

Alternate Character Name begins with

Middle Name begins with

☐ Include History ☐ Case Sensitive

Limit the number of results to (up to 300):

[Search](#) [Clear](#) [Basic Search](#) [Save Search Criteria](#)

11. Enter the employee ID in the **Employee ID** field and click the **Search** button.

The **Biographical Details** tab on the **Modify a Person** page displays.

Biographical Details **Contact Information** [Regional](#) [VA Person Info](#)

Person ID

Name [View All](#)

Effective Date 06/22/2021 [+](#) [-](#)

Format Type English

Display Name [View Name](#)

Biographic Information

Date of Birth 12/23/1973 Years 48 Months 1

Date of Death

Birth Country USA United States

Birth State

Birth Location ☐ Exclude Contact Information?

12. Click the **Contact Information** tab.



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HR351 Separation Statuses

The **Contact Information** tab on the **Modify a Person** page displays.

Email Option Selection

☐ Agency Provided Email ☒ Pending Agency Provided Email ☐ Employee Provided Email

Email Addresses

| *Email Type | *Email Address | Preferred | | |
|-------------|-----------------------|-------------------------------------|---|---|
| Business | john.doe@virginia.gov | <input checked="" type="checkbox"/> | + | - |

Instant Message IDs ?

1-1 of 1 | View All

| *IM Protocol | *IM Domain | *Network ID | Preferred | | |
|--------------|------------|-------------|--------------------------|---|---|
| | | | <input type="checkbox"/> | + | - |

[Save](#) [Return to Search](#) [Previous in List](#) [Next in List](#) [Notify](#) [Refresh](#) [Update/Display](#) [Include Histo](#)

[Biographical Details](#) | [Contact Information](#) | [Regional](#) | [VA Person Info](#)

13. Scroll down to the **Email Addresses** section. Uncheck the **Preferred** checkbox from the business email address.
14. Click the **Add a New Row** button to add a new email address.
15. Select **Personal** from the **Email Type** field, enter the personal email address in the **Email Address** field and check the **Preferred** checkbox.

Email Option Selection

☐ Agency Provided Email ☐ Pending Agency Provided Email ☒ Employee Provided Email

Email Addresses

| *Email Type | *Email Address | Preferred | | |
|-------------|-----------------------|-------------------------------------|---|---|
| Business | john.doe@virginia.gov | <input type="checkbox"/> | + | - |
| Personal | john.doe@hotmail.com | <input checked="" type="checkbox"/> | + | - |

Instant Message IDs ?

1-1 of 1 | View All

| *IM Protocol | *IM Domain | *Network ID | Preferred | | |
|--------------|------------|-------------|--------------------------|---|---|
| | | | <input type="checkbox"/> | + | - |

[Save](#) [Return to Search](#) [Previous in List](#) [Next in List](#) [Notify](#) [Refresh](#) [Update/Display](#) [Include](#)

16. Click the **Save** button.

Note: VRS will now hire VRS eligible employees into the VRS Retirement position.

17. To run the Employee Activity Report for the employee, use the following navigation:

Navigator > Workforce Administration > Job Information > Reports > Employee Activity Report

18. Run the Employee Activity Report for the employee.

Note: Refer to the **HCM Reports Catalog** for additional information and the steps used to run this report. The **HCM Reports Catalog** can be found on the Cardinal website under **Resources**.

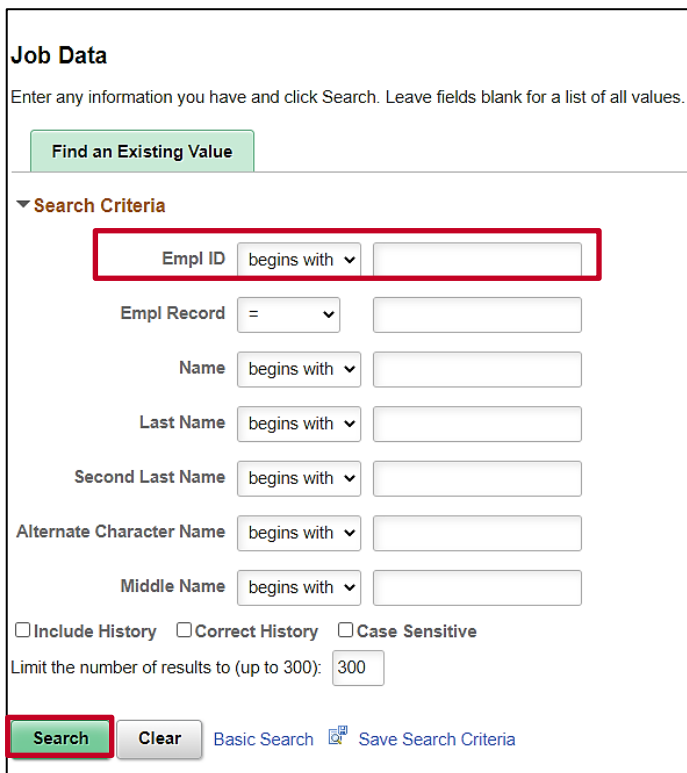
19. Print the report and place the printed transaction in the employee file for future audit requests.

Retirement – ORP Retiree

1. Navigate to the **Job Data** page using the following path:

Navigator > Workforce Administration > Job Information > Job Data

The **Job Data Search** page displays.



2. Search for the applicable employee by entering the Employee ID in the **Empl ID** field.

Note: You can also search by Employee Record or Name using the corresponding fields. However, it is recommended to use the Employee ID as it is a unique identifier for each employee.



- Click the **Search** button.

The **Job Data** page for the applicable employee displays with the **Work Location** tab displayed by default.

The screenshot shows the 'Work Location' tab selected. The 'Go To Row' button with a '+' icon is highlighted with a red box. The form displays the following fields:

- *Effective Date: 11/29/2021
- Effective Sequence: 0
- HR Status: Active
- Payroll Status: Active
- *Action: Hire
- Reason: New Hire
- *Job Indicator: Primary Job

- Click the **Add a New Row** icon (+) to add a new effective dated row.

The **Work Location** tab refreshes with a new effective dated row displayed.

Note: When adding a new effective dated row, Cardinal copies the data from the previous row to reduce the amount of data entry required.

- The **Effective Date** field defaults to the current system date. Update this date as needed using the **Calendar** icon.

Note: Set the effective date to be one day after the employee's last day worked. If an employee's last day is 11/10/2021, the effective date of the termination should be 11/11/2021. For further information on effective dating, see the Job Aid titled **HR351 Overview of Effective Dating**. This Job Aid can be found on the Cardinal website in **Job Aids** under **Learning**.

- Select the "**Retirement**" option using the **Action** field dropdown button.
- Select the "**Retirement – ORP**" using the **Reason** field dropdown button.

The **Job Data** page refreshes.

The screenshot shows the 'Work Location' tab selected. The 'Effective Date' field is highlighted with a red box, and the 'Action' and 'Reason' dropdowns are also highlighted with a red box. The form displays the following fields:

- *Effective Date: 02/01/2022
- Effective Sequence: 0
- HR Status: Inactive
- Payroll Status: Retired
- *Action: Retirement
- Reason: Retirement-ORP
- *Job Indicator: Primary Job



8. After selecting the action and action reason, the **HR Status** and **Payroll Status** fields will automatically update as applicable. Validate that the HR status displays as “Inactive” and the Payroll status displays as “Retired”.

Department 10630 Customer Service Criminal Hist
Department Entry Date 11/29/2021
Location CENTR Dept of Criminal Justice Serv.
Establishment ID DCJS Date Created 02/03/2022
Last Start Date 11/29/2021 Termination Date 01/31/2022
Expected Job End Date STD Claim Number
Layoff Notice Date
Last Date Worked 01/31/2022
Override Last Date Worked Recall Eligibility Flag
Job Data Employment Data Earnings Distribution Benefits Program Participation
Save Return to Search Notify Refresh

9. Click the **Save** button.

Note: Now the agency HR Administrator should hire the employee into the ORP retirement position using a new employment instance.

10. Navigate to **New Employment Instance** page using this path:

Navigator > Workforce Administration > Personal Information > Organizational Relationships > New Employment Instance

< Work Location New Employment Instance
Do you wish to open the Job Data associated to this emplid: [redacted] Employee Record: 0 (25101,91)
Yes No

11. Answer **No**, to the question “Do you wish to open the Job Data associated to this emplid:...”

< Work Location New Employment Instance
New Employment Instance
Empl ID [redacted]
Empl Record 1
Add Relationship



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12. Click the **Add Relationship** button to add job information for the new employee record.

Work Location | **Job Information** | Job Labor | Payroll | Salary Plan | Compensation

Employee: 0000000000
Empl ID: 0000000000
Empl Record: 1

Work Location Details ?

Effective Date: 02/01/2022
Effective Sequence: 0
HR Status: Active
Payroll Status: Active
Calculate Status and Dates

*Action: Hire
Reason: Hir ORP Ret
*Job Indicator: Primary Job

Go To Row + -

Position Number: ARSORP00
ORP Retiree Position
Override Position Data

Position Entry Date: 02/03/2022

13. The **Effective Date** field defaults to the current system date. Update this date as needed using the **Calendar** icon.

14. The **Action** field defaults to **Hire**.

15. In the **Reason** field select **Hir ORP Ret**.

16. Locate the ORP position for your agency using the **Position Number** search icon.

Note: Enter %ORP to search for the ORP position number.

17. Click the **Job Information** tab.

Work Location | **Job Information** | Job Labor | **Payroll** | Salary Plan | Compensation

Employee: 0000000000
Empl ID: 0000000000
Empl Record: 1

Job Information Details ?

Effective Date: 02/01/2022
Effective Sequence: 0
HR Status: Active
Payroll Status: Active
Go To Row

Action: Hire
Reason: Hir ORP Ret
Job Indicator: Primary Job

Job Code: COVHBO
Entry Date: 02/01/2022
Supervisor Level: E
Reports To: Regular/Temporary: Regular
Empl Class: ORPRetiree
Health Benefits Only
SOC Code
Employee: Supervisor Name
Full/Part: Full-Time
*Officer Code: None

18. Select the **ORPRetiree** in the **Empl Class**.



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19. Click the **Payroll** tab.

Work Location Job Information Job Labor **Payroll** Salary Plan Compensation

Employee Empl ID Empl Record 1

Payroll Information ?

Effective Date 02/01/2022 Go To Row

Effective Sequence 0 Action Hire

HR Status Active Reason Hir ORP Ret

Payroll Status Active Job Indicator Primary Job

*Payroll System Payroll for North America

Absence System Other

Payroll for North America ?

Pay Group Non-Payroll

Employee Type S Salaried

Tax Location Code

GL Pay Type

Holiday Schedule NOHOL

Subject

20. The **Payroll System** defaults to **Payroll for North America**. Do not change.

21. The **Absence System** defaults to **Other**. Do not change.

22. Select **MNP** in the Pay Group field. This is the Non-Payroll pay group.

Work Location Job Information Job Labor **Payroll** Salary Plan Compensation

Employee Empl ID Empl Record 1

Payroll Information ?

Effective Date 02/01/2022 Go To Row

Effective Sequence 0 Action Hire

HR Status Active Reason Hir ORP Ret

Payroll Status Active Job Indicator Primary Job

*Payroll System Payroll for North America

Absence System Other

Payroll for North America ?

Pay Group MNP Non-Payroll

Employee Type S Salaried

Tax Location Code

GL Pay Type

Holiday Schedule NOHOL LOCALITY

Subject

FICA Status

Combination Code

Edit ChartFields

23. Click the **Compensation** tab.



Employee Empl ID Empl Record 1

Compensation Details ? 1 of 1

Effective Date 02/01/2022 Go To Row

Effective Sequence 0

HR Status Active

Payroll Status Active

Action Hire

Reason Hir ORP Ret

Job Indicator Primary Job

Current

Compensation Rate 0.000000 *Frequency A Annual

► **Comparative Information** ?

► **Pay Rates** ?

Default Pay Components

Pay Components ? 1-1 of 1

Amounts **Controls** **Changes** **Conversion** **||**

| | *Rate Code | Seq | Comp Rate | Currency | Frequency | Percent | | |
|---|---------------|-----|---------------|---------------|---------------|---------|---|---|
| 1 | | 0 | | | | | + | - |

Calculate Compensation

Job Data **Employment Data** **Earnings Distribution** **Benefits Program Participation**

24. Click the **Defaults Pay Components** button
25. Select the **NAANNL Rate Code**.
26. No additional **Pay Component** fields should be entered. Click the **Calculate Compensation** button.
27. Click the **Benefits Program Participation** link.
28. Use the **Configuration Workbook** to complete **Eligibility Fields 2, 3, 8 & 9** based on the appropriate scenarios for the ORP Retiree.



Effective Date 2/01/2022
Effective Sequence 0
HR Status Active
Payroll Status Active
Action Hire
Reason New Hire
Job Indicator Primary Job

*Benefits System Benefits Administration
Annual Benefits Base Rate USD
Benefits Employee Status Active
Current
ACA Eligibility Details

Benefits Administration Eligibility

BAS Group ID
Elig Fld 1
Elig Fld 4
Elig Fld 7
Elig Fld 2 007008000
Elig Fld 5
Elig Fld 8 12-12
Elig Fld 3 N
Elig Fld 6
Elig Fld 9 RR-GB

Benefit Program Participation Details

*Effective Date 2/01/2022
Currency Code USD
*Benefit Program PSX
Sys delivered empty Ben Pgm

Job Data Employment Data Earnings Distribution Benefits Program Participation

Save Return to Search Notify Refresh Update/Display Include History

29. Click the **Save** button.

Note: VRS will now hire VRS eligible employees into the VRS Retirement position.

30. To run the Employee Activity Report for the employee, use the following navigation:

Navigator > Workforce Administration > Job Information > Reports > Employee Activity Report

31. Run the Employee Activity Report for the employee.

Note: Refer to the **HCM Reports Catalog** for additional information and the steps used to run this report. The **HCM Reports Catalog** can be found on the Cardinal website under **Resources**.

32. Print the report and place the printed transaction in the employee file for future audit requests.